MARCH/APRIL 1986
VOLUME 5, NUMBER 2

Seafood Business Report

THE MAGAZINE OF SEAFOOD MARKETING AND MANAGEMENT

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Fishermen's Wharf

SUPERMARKET SURVEY

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PACIFIC PACKERS REPORT ISSUE

RESTAURANTS RESPOND TO HIGH SEASONAL PRICES

MARCH/APRIL 1986
VOLUME 5, NUMBER 2

Seafood Business Report

THE MAGAZINE OF
SEAFOOD MARKETING AND MANAGEMENT

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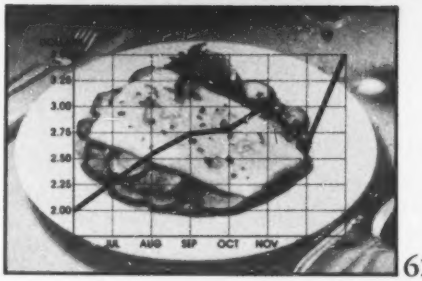

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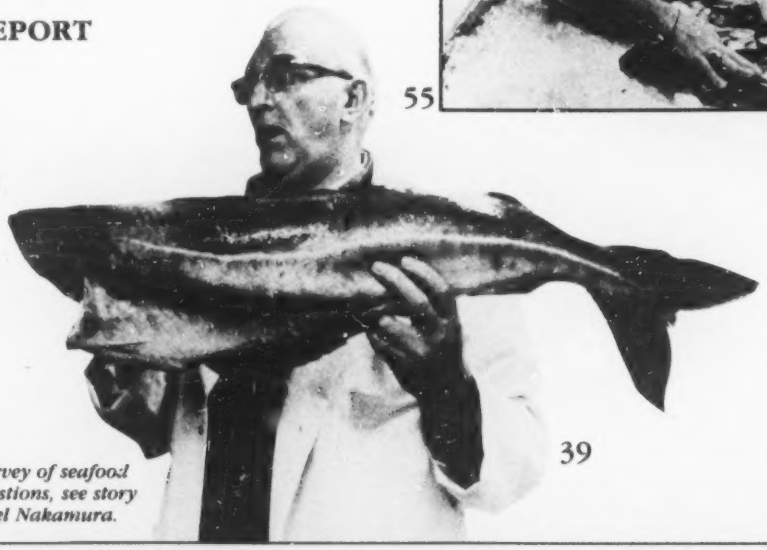
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COVER: SBR *covered a lot of ground in its survey of seafood retailers. For a look at the answers to our questions, see story by Susan Pollack on page 44. Photo by Michael Nakamura.*

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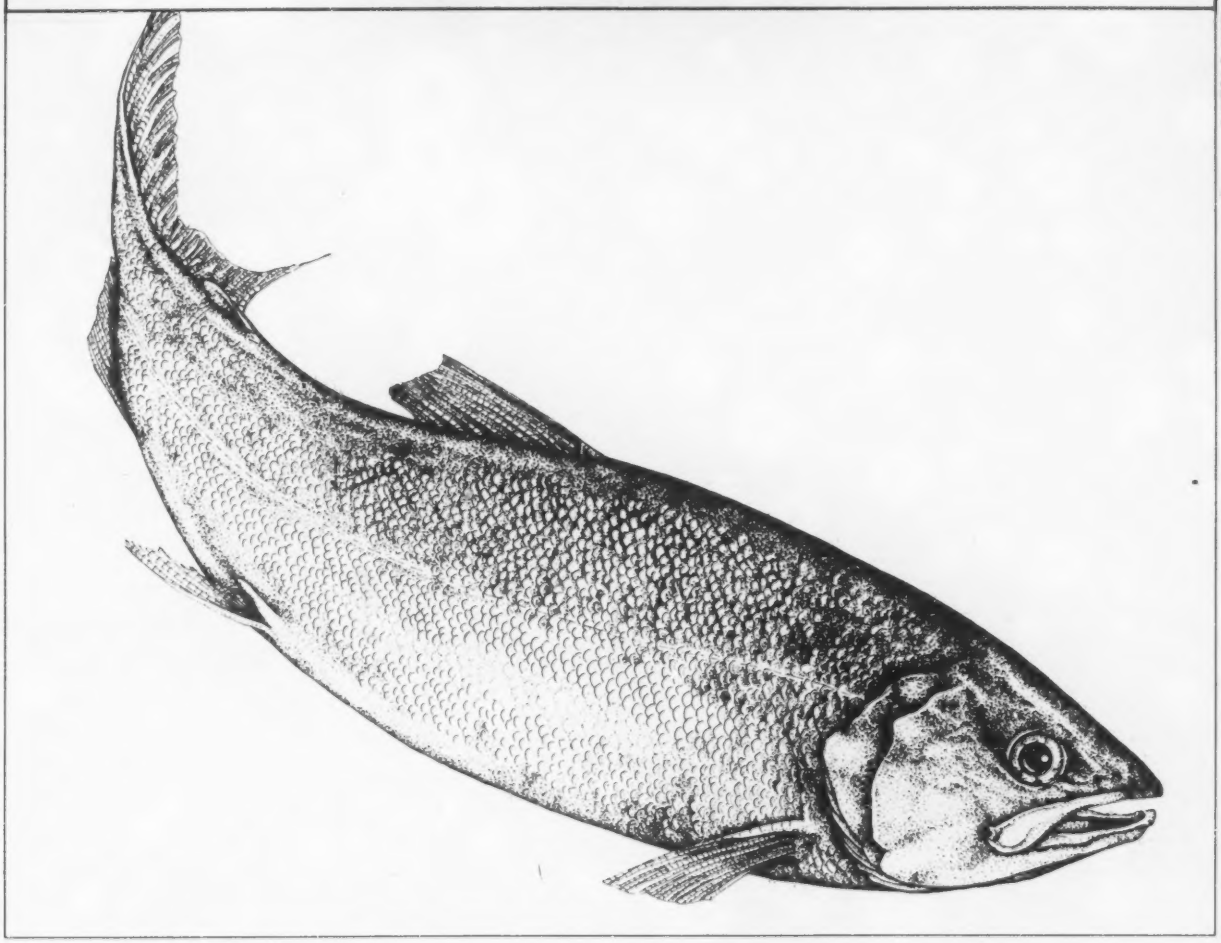
SALMON



SANDRA F. NOEL

Record Alaska harvests challenge market

When Alaska fishermen filled tender brailers last season, they delivered record numbers of salmon — and a unique marketing challenge to the industry. Catches of pink salmon rose again in 1985, to more than 89 million fish statewide. That's nearly 14 million more than in 1984, when the catch was about 15 million more than in 1983. To complete the picture, biologists are predicting a statewide harvest of more than 95 million pinks this year.

Canners started the 1985 season with a carry-over pack of 1,133,913 cases — 50 percent more than the previous year. But the industry put up nearly identical amounts of pink salmon: 2,546,345 cases in 1985, just 2.4 percent less than 1984's pack. The resultant drop in prices, ranging from $5 to $10 per case, did little to reverse sluggish sales. Prices remained extremely

(Continued page 73.)

1985 Pacific Canned Salmon Packs and Values

(48-LB. CASE EQUIVALENTS)

	RED		PINK		CHUM		COHO		KING		TOTAL	
	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)
Alaska	449,593	57,262,938	2,546,345	160,614,192	93,722	5,271,530	16,079	1,540,316	2,525	230,490	3,108,264	224,919,466
Washington	17,363	2,812,656	93,110	7,132,047	2,472	151,049	2,537	1,170,912	95	9,550	115,577	11,276,214
Total United States[1]	466,958	60,075,594	2,639,454	167,746,239	96,194	5,422,579	18,616	2,711,228	2,621	240,040	3,223,845	236,195,680
British Columbia*	590,302	117,145,000	1,067,301	123,615,000	272,659	24,714,000	40,201	6,335,000	4,679	495,000	1,976,173	272,406,000
GRAND TOTAL	1,057,260	177,220,594	3,706,755	291,361,239	368,853	30,136,579	58,817	9,046,228	7,300	735,040	5,200,018	508,601,680

[1]Totals may not add due to rounding. *steelhead included in total. Value in Canadian funds.

Note: Data are preliminary. Values are estimated. B.C. values are based on estimated gross wholesale values, all others on estimated net wholesale.

Source: National Food Processors Association; Marine Resources Branch, Province of B.C.; NMFS; and *Seafood Business Report*

soft through mid-winter. Sales were spurred by Lenten promotions, but prices remained soft. Despite brisk sales, the carry-over pack on July 1 is expected to be larger than last year's.

Frozen pinks were purchased in large volume last year by Hormel and Ralston-Purina for the skinless, boneless canned market. Both companies are expected to buy large quantities of pinks again in 1986, and it's likely that more pink salmon will go to the frozen whole or filleted market. Alaska Seafood Marketing Institute's successful salmon burger campaign will continue to promote canned salmon to consumers this year. The State of Alaska is conducting a project to develop two frozen-block products of pink salmon mince and fillets for the institutional market. But few processors are equipped to produce frozen blocks, and the nature of the run requires an extremely large volume of fish to be processed in a very short period.

In the face of large harvest forecasts and a weakening market, many Alaskan processors are considering delivery quotas for fishermen during the season. In the past, this has resulted in "overcatches," and some dumping of fish. The State of Alaska could, under emergency conditions, negotiate to bring in foreign buyers to take the excess. While this may be a short-term solution, the foreign-processed canned salmon would ultimately compete at lower prices on the world market with U.S. production.

Canned production was down for all species except king salmon, which increased 32 percent over 1984's pack. The chum pack was 70 percent lower than last year's, canned cohos were down 65 percent, and canned red-salmon production was down 55 percent. Of can sizes, only pink 4-pound talls and quarter-pounds showed an increase.

The frozen export market for sockeyes was strong in 1985, resulting in nearly 80,000 tons of sockeye exports to Japan. Retail sales slowed at the onset of the huge Hokkaido chum run late in the year, and prices have dropped in Japan. Despite the lower prices, industry estimates tagged the amount of carry-over imported salmon at more than 70,000 tons, nearly twice the carry-over from a year earlier. Lower catch projections on sockeye throughout the state (10 million fewer fish in Bristol Bay, 8 million statewide) may improve the supply situation in Japan, and one industry observer says wholesale spring prices should be "moderate, in the $1.85–$1.90 range, not more than $2 per pound" for red salmon.

End-of-the-year inventories in this country showed 6 million pounds of

(Continued page 76.)

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Circle Reader Inquiry #70

1985 Western Alaska

(48-LB. CASE EQUIVALENTS)

COMPANY	LOCATION	RED 1 & 4 lb cans	RED ½ & ¼ lb cans	RED Total	PINK 1 & 4 lb cans	PINK ½ & ¼ lb cans	PINK Total
Columbia-Wards Fisheries	Ekuk	3,316	42,006	45,322			
Nelbro Packing Co.	Naknek	5,735	38,810	44,545			
Peter Pan Seafoods	Dillingham	28,715	32,940	61,655			
Red Salmon Company	Naknek	9,558	69,058	78,616			
Sea Alaska Products	All locations	11,338	55,334	66,672			
Far West Fisheries	Naknek	31,899	27,967	59,866			
TOTAL	Western Alaska	90,561	266,115	356,676			

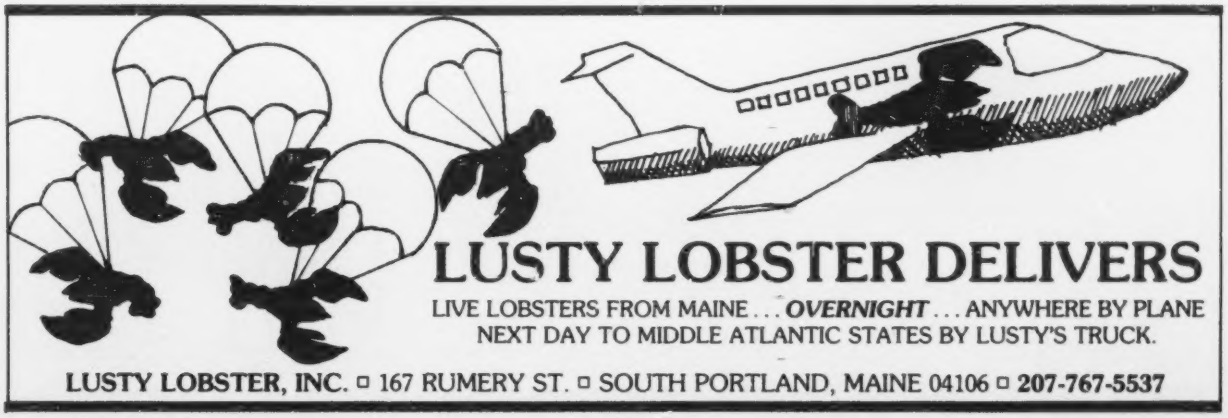
1985 Central Alaska

COMPANY	LOCATION	RED 1 & 4 lb cans	RED ½ & ¼ lb cans	RED Total	PINK 1 & 4 lb cans	PINK ½ & ¼ lb cans	PINK Total
Columbia-Wards Fisheries	Alitak	883	106	989	42,142	22,886	65,028
	Kenai	15	2,112	2,127	11,525	34,091	45,616
	Kodiak	26	3	29	16,690	1,382	18,072
	Total	924	2,221	3,145	70,357	58,359	128,716
Icicle Seafoods Inc.	Seward	233	6,889	7,122	117,400	48,109	165,509
Peter Pan Seafoods, Inc.	King Cove	3,050	55,534	58,584	68,113	47,723	115,836
TOTAL	Central Alaska	4,207	64,644	68,851	255,870	154,191	410,061

1985 Southeast Alaska

COMPANY	LOCATION	RED 1 & 4 lb cans	RED ½ & ¼ lb cans	RED Total	PINK 1 & 4 lb cans	PINK ½ & ¼ lb cans	PINK Total
Annette Island Packing Co.	Metlakatla	265	299	564	123,388	25,659	140,047
Columbia-Wards Fisheries	Craig	240		240	63,325		63,325
Excursion Inlet Packing Co.	Excursion Inlet				156,218	65,246	221,464
Icicle Seafoods Inc.	Petersburg	113	614	727	303,350	67,555	370,905
Nelbro Packing Company	Petersburg	45		45	82,683	11,842	94,525
Wards Cove Packing Co., Inc.	Ketchikan	136	267	403	183,199	15,987	199,186
Far West Fisheries	Ketchikan	27	245	272	220,601	41,547	262,148
TOTAL	Southeast Alaska	826	1,425	2,251	1,132,764	227,836	1,360,600

Note: Totals do not include production from the following companies:
Western: Bering Sea Fisheries, Inc.,; Queen Fisheries, Inc.,; and Togiak Fisheries, Inc.
Central: Alaska Pacific Seafoods, Inc.; Kodiak King Crab; Kenai Packers; Chugach Alaska Fisheries, Inc.; and St. Elias Ocean Products
Southeastern: Chatham Strait Seafoods Co.; and Klawock Oceanside Fisheries, Inc.
Source: *Seafood Business Report*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Circle Reader Inquiry #79

Canned Salmon Pack

CHUM 1 & 4 lb cans	CHUM ½ & ¼ lb cans	CHUM Total	COHO 1 & 4 lb cans	COHO ½ & ¼ lb cans	COHO Total	KING 1 & 4 lb cans	KING ½ & ¼ lb cans	KING Total	TOTAL	COMPANY
1,223	3,155	4,378				246	438	684	50,384	Columbia-Wards Fisheries
	572	572					125	125	45,242	Nelbro Packing Co.
3,233	1,032	4,265				377	88	465	66,385	Peter Pan Co.
51	368	419							79,035	Red Salmon Co.
526		526	60		60				67,258	Sea Alaska Products
452	186	638				17	30	47	60,551	Far West Fisheries
5,485	5,313	10,798	60		60	640	681	1,321	368,855	TOTAL

Canned Salmon Pack

CHUM 1 & 4 lb cans	CHUM ½ & ¼ lb cans	CHUM Total	COHO 1 & 4 lb cans	COHO ½ & ¼ lb cans	COHO Total	KING 1 & 4 lb cans	KING ½ & ¼ lb cans	KING Total	TOTAL	COMPANY
542	10	552	146	32	178				66,747	Columbia-Wards Fisheries
675	201	876	7	117	124				48,743	
936	157	1,093	210	5	215				19,409	
2,153	368	2,521	363	154	517				134,899	
2,098	18	2,116	127	843	970	90	3	93	175,810	Icicle Seafoods Inc.
24,489	17,307	41,796	130	6,080	6,210				222,426	Peter Pan Seafoods, Inc.
28,740	17,693	46,433	620	7,077	7,697	90	3	93	533,135	TOTAL

Canned Salmon Pack

CHUM 1 & 4 lb cans	CHUM ½ & ¼ lb cans	CHUM Total	COHO 1 & 4 lb cans	COHO ½ & ¼ lb cans	COHO Total	KING 1 & 4 lb cans	KING ½ & ¼ lb cans	KING Total	TOTAL	COMPANY
1,080		1,080	424	231	655				151,346	Annette Island Packing Co.
1,100		1,100	402		402				65,067	Columbia-Wards Fisheries
									221,464	Excursion Inlet Packing Co.
1,413		1,413	70	472	542				373,587	Icicle Seafoods Inc.
558		558	15		15				95,143	Nelbro Packing Co.
675	131	806	107	356	463				200,858	Wards Cove Packing Co., Inc.
1,101	90	1,191	158	79	237				263,848	Far West Fisheries
4,937	221	6,148	1,176	1,138	2,314				1,371,313	TOTAL

Percent Alaska Salmon Canned Versus Percent Fresh, Frozen and Cured

YEAR	RED Canned	RED Frozen	PINK Canned	PINK Frozen	CHUM Canned	CHUM Frozen	COHO Canned	COHO Frozen	KING Canned	KING Frozen	TOTAL Canned	TOTAL Frozen	YEAR
1971	91.38	8.62	98.0	2.00	80.87	19.13	57.51	42.49	18.08	81.92	85.88	14.12	1971
1972	93.05	6.95	95.41	4.59	72.17	27.83	30.56	69.44	13.78	86.22	77.26	22.74	1972
1973	72.95	27.05	93.57	6.43	50.70	49.30	20.58	79.42	6.05	93.95	61.03	38.97	1973
1974	88.02	11.98	89.68	10.32	53.35	46.65	30.90	69.10	11.22	88.78	66.72	33.28	1974
1975	78.81	21.19	93.58	6.42	41.25	58.75	4.83	95.17	8.00	92.00	67.25	32.75	1975
1976	81.87	18.13	91.72	8.28	61.57	38.43	21.04	78.96	22.35	77.65	75.87	24.13	1976
1977	68.51	31.49	92.41	7.59	60.24	39.76	12.73	87.27	5.68	94.32	71.02	28.98	1977
1978	56.66	43.34	71.38	28.62	46.52	53.48	13.67	86.33	7.35	92.65	64.49	35.51	1978
1979	42.51	57.49	83.43	16.57	40.04	59.96	13.08	86.92	6.23	93.77	57.09	42.91	1979
1980	45.31	54.69	83.54	16.46	47.62	52.38	21.92	78.08	9.82	90.18	57.87	42.13	1980
1981	40.78	59.22	78.01	21.99	50.69	49.31	10.87	89.13	3.09	96.91	55.14	44.86	1981
1982	11.53	88.47	64.82	35.18	17.04	82.96	5.72	94.28	1.24	98.76	32.44	67.56	1982
1983	33.37	66.63	78.45	21.55	24.45	75.55	10.74	89.26	3.47	96.53	44.09	55.91	1983
1984	32.30	67.70	73.54	26.46	24.34	75.66	8.40	91.60	1.08	98.92	46.20	53.80	1984
1985	14.49	85.51	66.50	33.50	9.29	90.71	2.91	97.09	1.27	98.73	36.34	63.66	1985

Source: *Seafood Business Report*

1986 ALASKA SALMON HARVEST FORECASTS

for selected areas with statewide totals

(THOUSANDS OF FISH)

MANAGEMENT AREA	RED	PINK	CHUM	COHO	KING	TOTAL
Southern Southeast		31,900				
Northern Southeast		6,500				
Southeastern Region Total	1,500	38,400	3,000	2,300	261	45,461
Prince William Sound		23,400	882			
Coghill	512					
Copper River	854				30	
Lower Cook Inlet		1,999				
Upper Cook Inlet	4,200					
Bristol Bay	12,100					
Nushagak		3,100			108	
Togiak					24	
Central Region Total	17,834	29,849	2,897	1,520	162	52,262
Kodiak		15,680				
Chignik	2,161	1,900				
South Peninsula		6,400				
Westward Total	6,740	27,080	2,955	700	38	37,513
Arctic-Yukon-Kuskokwim	80	220	1,750	145	223	2,418
ALASKA TOTAL*	26,154	95,549	10,602	4,665	684	137,654

Note: Data are preliminary.
*Totals are for regions listed only
Source: ADF&G

red salmon in cold storage, but after several large purchases by Japanese companies in January, virtually no #1 reds were left. Prices for a major volume (1.6 million pounds) were in the low $1.90s for 2–4-pound fish, but smaller volumes sold for $.15 more per pound. Larger sizes were commanding prices from $2.25 to $2.60 in early January.

Frozen coho salmon moved well this season, but prices have firmed only in recent months, as supplies of top-quality 6–9-pound fish diminish. Inventories are running slightly higher than one year ago. Chum inventories are also higher, due primarily to a bumper harvest in Puget Sound and Southeast Alaska. Larger sizes of chum were in low supply at the beginning of the year, and moving well. Prices for the smaller sizes (#1 4–6 pounds) were steady in mid-January. An astonishing 10.8 million pounds of frozen pinks were on ice in late December, compared with 1.9 million pounds one year earlier. Movement was brisk late in the year, however, with more than 4 million pounds moving in the month

(Continued page 81.)

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Circle Reader Inquiry #73

1985 Fresh and Frozen Salmon and Salmon Roe

(NET: WHOLE POUNDS; TROLL: DRESSED POUNDS; ROE: FINISHED POUNDS)

COMPANY AND LOCATION	NET SALMON, SOLD Frozen	NET SALMON, SOLD Fresh	TROLL CAUGHT SALMON, SOLD Frozen	TROLL CAUGHT SALMON, SOLD Fresh	TOTAL SALMON	SALMON ROE
ALASKA						
Alaska Far East Corporation						
Naknek	1,700,000				1,700,000	42,500
Alaska Specialty Seafood,						
Ketchikan	25,000	70,000		25,000	120,000	7,000
Aleutian Dragon Fisheries, *Chignik*	1,843,878				1,843,878	
American Eagle Seafood,						
M/V Aleutian Dragon	2,000,000				2,000,000	50,000
Annette Island Packing Co.						
Metlakatla	2,776,503		122,820		2,899,323	341,605
F/V Arctic				575	575	
Calista Fisheries, *M/V Mokuhana*	1,194,479				1,194,479	37,785
Columbia-Wards Fisheries, *Alitak*	1,353,907				1,353,907	
Chignik	234,249				234,249	
Craig	519,264				519,264	
Ekuk	2,121,246	90,425			2,211,671	
Kenai	5,440,015	482,128			5,922,143	
Moser Bay	1,396,873				1,396,873	
Port Bailey	1,262,227				1,262,227	
Copper River Fishermen's Cooperative						
Cordova	4,797,686	202,310			4,999,996	208,197
Courageous Fisheries,						
F/V Courageous	1,400,000				1,400,000	
Dutch Harbor Seafoods, Ltd.,						
F/Vs Galaxy, Viceroy, Omnisea	5,519,938				5,519,938	
Excursion Inlet Packing Co.,						
Excursion Inlet	1,586,661		2,085,295		3,671,956	
Far West Fisheries, *all locations*						591,788
Gayle Wind Seafoods, *Petersburg*		1,086		15,891	16,977	
Haines Packing Co., *Haines*	3,606,009				3,606,009	
High Tide Seafoods, *Valdez*	110,000	4,050,000			4,160,000	
Icicle Seafoods, *Arctic Star*	9,846,452				9,846,452	267,982
Bering Star	7,583,651	12,643			7,596,294	
Petersburg	11,720,493	29,880	292,567	41,236	12,084,176	1,553,180
Seward	2,392,892	233,057	4,514		2,630,463	658,512
Homer	4,836,853	115,844			4,952,697	183,997
International Seafoods of Alaska, Inc.						
Kodiak	5,459,871	20,000			5,479,871	172,000
Kemp Pacific Fisheries, *all locations*	19,000,000	1,000,000			20,000,000	650,000
Nakamura & Associates Inc., *Marshall*	210,175	16,300			226,475	
Nelbro Packing Co., *Petersburg*	212,417				212,417	307,382
Naknek	1,726,530				1,726,530	98,180
Norfin Inc., *all locations*	2,078,914	205,811	110,000		2,394,725	97,250
Northern Products Corporation,						
Hoonah	116,417		673,910		790,327	15,368
Northern Seafoods Inc., *Anchorage*						440,000
Pelican Seafoods, Inc.,						
M/V Polar Ice	1,450,000		54,000		1,504,000	
Sandpoint	7,040,000				7,040,000	180,000
Pelican	2,340,000		2,620,000		4,960,000	33,000
Peter Pan Seafoods Inc.,						
Port Moller	9,038,484				9,038,484	236,312
King Cove	9,999,250				9,999,250	863,127
Dillingham	5,210,228	133,935			5,344,163	282,114
Red Salmon Company, *Naknek*	4,549,446				4,549,446	
Sea Alaska Products, *all locations*	4,543,668				4,543,668	
Seafood Producers/Quality Seafoods						
Sitka	1,222,235	66,000	4,854,942	90,000	6,233,177	66,000
Silver Lining Seafoods, *Ketchikan*	480,000	350,000	150,000	70,000	1,050,000	60,000
Sitka Sound Seafoods, Inc., *Sitka*	4,264,307	3,361	3,357,698	123,193	7,748,559	189,251
Universal Seafoods, Ltd.,						
Dutch Harbor	537,614				537,614	
Ursin Seafoods, Inc., *Kodiak*	1,553,000				1,553,000	93,400
Wards Cove Packing Co.,						
Ketchikan	1,221,974				1,221,974	
Western Alaska Fisheries, *Kodiak*	5,500,000				5,500,000	175,000
Westward Fisheries, Inc., *Egigik*	1,378,000	572,000			1,950,000	65,356
Whitney Foods/Anchorage Cold Storage						
Anchorage	5,066,700	533,300			5,600,000	240,000
TOTAL ALASKA	**169,467,506**	**8,188,080**	**14,325,746**	**365,895**	**192,347,227**	**8,206,286**
WASHINGTON						
Arrowac Fisheries Inc./Merco						
Intertrade Inc., *Bellingham*	2,850,000	150,000	50,000		3,050,000	100,000
Ebb Tide Processing, Inc.						
Anacortes	201,076*				201,076	26,113
Vancouver Seafood, Inc. *Vancouver*		44,077			44,077	
TOTAL WASHINGTON	3,051,076	194,077	50,000		3,295,153	126,113
OREGON						
Sportsmen's Cannery,						
Winchester Bay		2,000		101,000	103,000	1,000
TOTAL OREGON		2,000		101,000	103,000	1,000
CALIFORNIA						
Long Beach Seafood Company,						
Long Beach	240,000	20,000			260,000	
Meredith Fish Co., *Sacramento*			500,000	200,000	700,000	
TOTAL CALIFORNIA	240,000	20,000	500,000	200,000	960,000	

*dressed weight

Source: *Seafood Business Report*

Pacific Canned Salmon Packs and Values by State

(48-LB. CASE EQUIVALENTS)

	ALASKA		WASHINGTON		OREGON		U.S. TOTAL*		BRITISH COLUMBIA*		GRAND TOTAL		
YEAR	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	YEAR
1940	5,028,378	31,828,451	222,808	2,825,000	297,716	4,129,220	5,548,902	38,782,681	1,467,227	427,923	7,016,129	50,209,908	1940
1941	6,906,503	57,466,702	491,311	6,162,000	399,840	5,925,444	7,798,799	69,567,646	2,248,870	18,406,545	10,047,649	87,974,191	1941
1942	5,089,109	48,677,509	366,065	6,909,000	397,331	6,890,162	5,852,515	62,476,671	1,811,560	20,050,238	7,664,075	82,526,909	1942
1943	5,396,509	58,579,194	149,175	2,309,000	130,707	2,857,246	5,677,158	63,761,440	1,258,221	11,673,469	6,935,379	75,434,909	1943
1944	4,877,796	51,608,544	81,490	1,774,000	159,783	3,445,244	5,119,943	56,843,448	1,097,558	11,479,093	6,652,646	68,322,541	1944
1945	4,338,692	44,528,964	414,258	4,845,000	155,292	3,287,812	4,913,335	52,699,776	1,739,311	18,409,962	6,217,521	71,109,738	1945
1946	3,971,109	58,667,561	385,437	13,020,000	206,563	7,165,645	5,568,149	79,006,206	1,348,138	17,532,462	5,916,287	96,538,668	1946
1947	4,302,466	91,297,885	957,429	21,420,000	338,852	11,133,690	5,612,644	124,364,575	1,505,157	24,900,000	7,117,379	149,264,575	1947
1948	4,010,612	100,694,614	484,102	12,685,858	314,556	10,956,513	4,820,687	124,703,080	1,308,137	26,579,000	6,128,824	151,282,080	1948
1949	4,391,051	81,262,468	973,740	17,481,782	158,472	4,665,290	5,524,376	103,430,780	1,436,464	27,654,489	6,960,840	131,085,269	1949
1950	3,272,643	81,403,511	670,341	18,285,000	176,063	6,193,000	4,119,047	105,881,511	1,482,560	30,155,177	5,602,056	183,885,502	1950
1951	3,534,315	77,201,463	906,252	21,357,974	175,091	6,631,198	4,615,658	105,190,635	1,955,475	46,261,080	6,571,133	151,451,715	1951
1952	3,574,191	76,357,016	749,591	17,122,352	140,565	4,784,421	4,455,022	99,636,808	1,293,435	27,751,435	5,741,490	127,388,243	1952
1953	2,934,667	60,987,334	838,422	18,680,750	127,808	4,063,675	3,911,333	83,747,184	1,821,269	35,060,600	5,732,602	118,807,784	1953
1954	3,207,154	66,139,617	973,941	25,727,689	92,291	3,130,700	4,275,548	95,063,437	1,742,736	39,293,176	6,018,284	134,356,613	1954
1955	2,457,969	58,839,784	764,719	17,569,902	138,250	4,996,355	3,286,785	81,436,652	1,406,100	31,644,673	4,692,885	113,081,325	1955
1956	2,950,354	76,948,880	334,505	11,097,115	147,105	5,401,329	3,432,658	93,472,448	1,118,279	32,231,241	4,550,937	125,703,989	1956
1957	2,442,710	62,564,386	624,842	18,296,970	118,161	4,948,224	3,187,887	85,887,711	1,424,264	35,872,414	4,612,151	207,647,836	1957
1958	2,974,993	65,531,283	625,909	20,659,030	134,754	6,053,733	3,736,661	92,290,276	1,908,056	56,740,772	5,644,717	149,031,048	1958
1959	1,770,795	49,493,910	585,487	18,118,907	101,712	4,239,463	2,457,994	71,852,280	1,077,097	35,280,411	3,535,091	107,132,691	1959
1960	2,571,265	73,055,345	201,398	8,695,057	61,799	2,966,921	2,834,462	84,717,323	631,150	22,768,000	3,465,612	107,485,323	1960
1961	3,211,962	99,352,358	401,121	14,580,389	83,643	4,077,528	3,696,726	118,010,275	1,403,994	45,778,726	5,100,720	163,789,001	1961
1962	3,475,196	93,710,090	246,658	8,759,840	79,260	3,561,098	3,801,114	106,031,028	1,816,585	52,751,840	5,617,699	158,732,868	1962
1963	2,650,199	67,109,620	569,579	17,382,900	69,799	3,145,849	3,289,577	87,638,369	1,203,271	34,613,527	4,492,848	122,251,896	1963
1964	3,549,379	87,530,030	130,329	4,755,873	79,603	3,480,322	3,759,311	95,766,225	1,255,308	43,676,000	5,014,619	139,442,225	1964
1965	3,310,064	106,041,505	248,882	9,915,359	113,489	4,975,716	3,672,435	120,932,580	913,957	35,060,000	4,586,392	155,992,580	1965
1966	3,976,957	119,048,988	274,363	11,409,197	92,727	4,119,485	4,344,047	134,577,670	1,819,215	64,061,552	6,163,262	198,639,222	1966
1967	1,464,006	52,081,517	485,051	18,631,135	123,213	5,408,690	2,072,270	76,121,342	1,465,708	57,141,000	3,537,978	133,262,342	1967
1968	3,168,127	103,411,623	140,368	6,100,705	48,644	2,205,942	3,357,139	111,718,270	1,746,457	65,481,973	5,103,596	177,300,243	1968
1969	2,252,022	84,676,144	203,422	9,452,463	64,306	3,096,920	2,519,750	97,225,527	624,153	30,110,000	3,143,903	127,335,527	1969
1970	3,564,508	124,577,532	189,383	10,323,798	58,268	3,330,040	3,812,159	138,231,370	1,423,882	58,908,000	5,236,041	138,290,278	1970
1971	2,899,011	107,981,152	463,132	23,275,554	151,017	6,719,640	3,513,160	137,976,346	1,404,005	65,803,000	4,917,165	203,779,346	1971
1972	1,705,326	75,293,999	190,334	11,925,259	34,993	1,933,916	1,930,653	89,153,174	1,172,752	55,134,000	3,103,405	144,287,174	1972
1973	1,209,757	86,416,654	304,934	28,499,916	32,213	3,192,098	1,546,904	118,108,668	1,550,114	127,065,000	3,097,018	245,173,668	1973
1974	1,343,254	98,860,487	578,009	45,250,006	56,331	4,603,068	1,977,594	148,713,561	1,428,882	114,312,000	3,406,476	263,025,561	1974
1975	1,383,900	95,423,802	162,204	14,293,000	9,126	697,000	1,555,230	110,413,802	517,370	43,252,000	2,072,600	153,665,802	1975
1976	2,469,530	178,284,574	135,518	13,946,000	5,850	627,000	2,610,898	192,857,574	1,025,830	91,733,000	3,636,728	284,590,574	1976
1977	2,594,659	188,834,352	230,905	20,646,000	1,554	228,000	2,827,118	209,708,352	1,346,967	122,987,000	4,174,085	332,695,352	1977
1978	2,921,565	211,357,826	11,292	913,000	2,394	380,000	2,935,251	212,650,826	1,126,876	115,913,000	4,062,127	328,563,826	1978
1979	3,048,800	253,068,900	144,041	15,765,476	170	25,075	3,193,011	268,859,451	955,225	115,927,000	4,148,236	384,786,451	1979
1980	4,131,800	370,642,100	26,053	5,119,000	263	30,000	4,158,116	375,791,100	1,114,426	146,828,000	5,272,542	522,619,000	1980
1981	4,431,925	405,322,000	202,732	17,336,000			4,634,657	422,658,000	1,800,545	237,391,000	6,435,202	660,049,000	1981
1982	2,434,700	190,559,000	71,697	8,406,000	390	48,000	2,506,787	199,013,000	815,464	133,892,471	3,322,251	332,905,471	1982
1983	3,601,263	308,329,034	174,995	13,356,654			3,776,258	321,685,688	1,485,801	169,196,542	5,262,059	490,882,230	1983
1984	3,977,725	359,388,848	111,715	12,146,265			4,089,440	371,535,113	700,225	83,058,755	4,789,665	454,593,868	1984
1985	3,108,264	224,919,466	115,577	11,276,214			3,223,845	236,195,680	1,976,173	272,406,000	5,200,018	508,601,680	1985

*1941-1958 totals include small California pack. *Steelhead included. Value in Canadian funds. Note: 1985 data are preliminary.

Source: State and provincial fisheries agencies, National Food Processors Association, NMFS, *Seafood Business Report*

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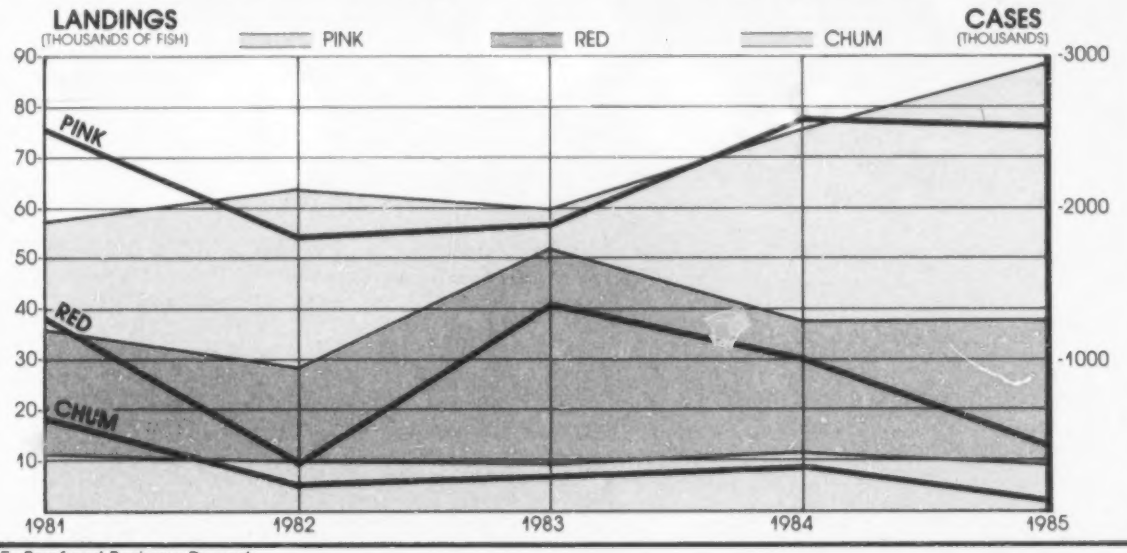
of November alone.

Imports of fresh salmon continued to rise throughout 1985, as Norwegian and Chilean product gained ground in both foodservice and retail markets. Total fresh imports through November were 16.8 million pounds, already exceeding the 1984 total by 2 million pounds.

Almost 64 percent of Alaska's record salmon catch was marketed fresh or frozen in 1985. This is the largest percentage since 1982, when industry reaction to a botulism scare brought 67 percent of its annual production to the fresh-frozen market.

More emphasis was given to marketing fresh salmon in 1985, as fresh production from major processors increased and the number of small operations supplying strictly fresh salmon rose. Spring promotions flaunting the first wild salmon of the year — fresh Columbia River kings or Copper River reds — are becoming annual events at many white-tablecloth restaurants on the West Coast. ■

SALMON LANDINGS VERSUS CANNED PACK



SOURCE: *Seafood Business Report*

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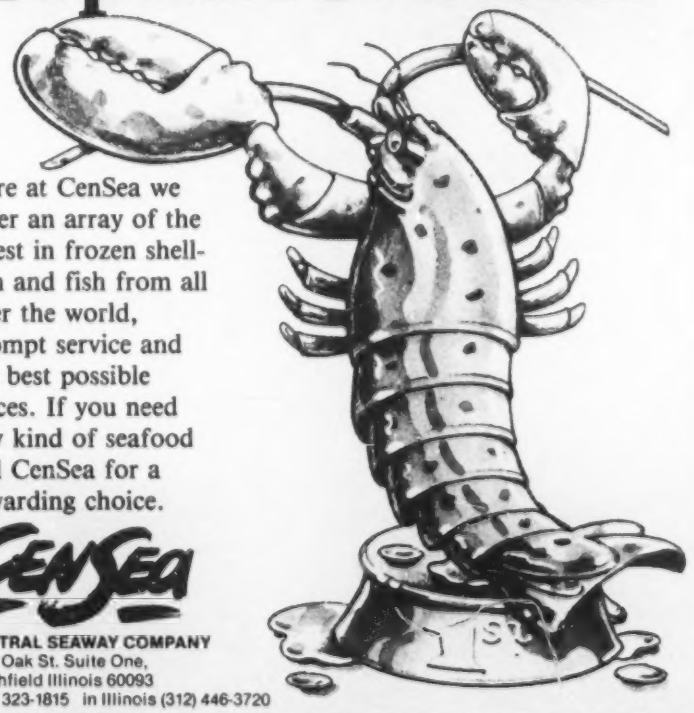

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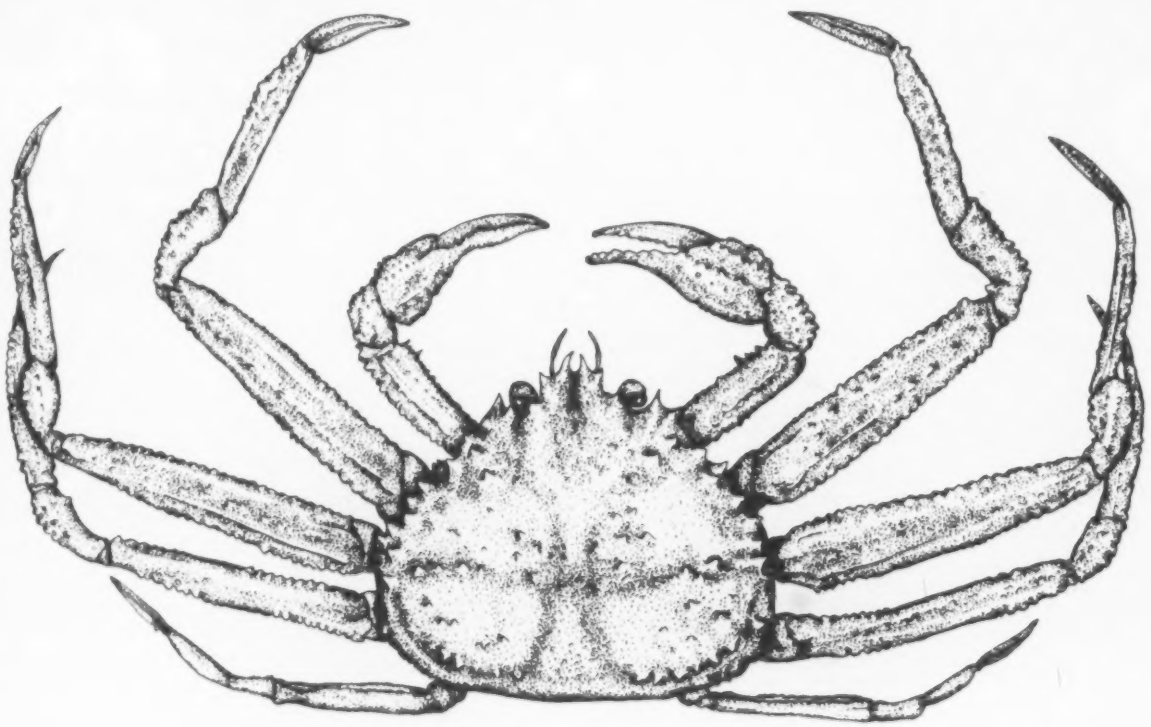
SHELLFISH



SANDRA F. NOEL

Shellfish supplies decline, prices stabilize

The 1985 market for crab was characterized by low supplies of king and *bairdi* (the larger of the two tanner crabs), and prices reflected the shortage throughout the year. King crab sales are often driven by price rather than supply, but as market interest grew and inventories diminished, wholesale prices crept steadily upward.

By spring 1985 king crab landings were 9 million pounds below spring 1984 levels, and Japanese buyers led the charge in a bullish market. Supplies remained short and prices firm until lower-priced Soviet king crab hit the market. This blast-frozen product, a by-catch of a Soviet/U.S. joint venture, was well received by foodservice buyers and stimulated sales on domestic product as well. But suppliers of the already price-sensitive Alaskan crab felt more pressure to lower prices. For several weeks it was difficult to pin prices down. When the dust settled and both products found their niche in the market, prices stabilized and began a slow, steady track upward.

Total king crab landings in 1985 were just over 15 million pounds, 2 million pounds below 1984 catch levels. The catches of blue kings in the St. Matthews and Pribilof Islands areas were up slightly from last year, as were red king catches from the Norton Sound and Bristol Bay areas of the Bering Sea. But Kodiak, the South Aleutian Peninsula, and Dutch Harbor remained closed on red kings for the third year in a row, due to poor stocks. Biologists will conduct population surveys in those areas again this summer, but no fishery is projected for late 1986.

The continental shelf of Bristol Bay appears to be a prime nursery ground for red king crab, but research biologists are still worried about survey results that show continued low-population stocks. Fishermen familiar with the area and its resources, however, have reported startling numbers of sub-size king crab showing up in pot hauls. This is the second season in a row that fishermen have reported an abundance of juvenile crab in the area. In a week-long season last fall, 100 vessels harvested more than 4 million pounds of adult

1985 West Coast Frozen Shellfish

(WHOLE POUNDS, IN SHELL)

COMPANY AND LOCATION	KING CRAB	TANNER CRAB *BAIRDI*	TANNER CRAB *OPILIO*	DUNGENESS CRAB	SHRIMP	SCALLOPS	CLAMS	OYSTERS	ABALONE	TOTAL
ALASKA										
Alaska Specialty Seafood, *Ketchikan*	10,000	5,000								15,000
F/V Arctic	2,000	3,000		12,761						17,761
Arctic Alaska Seafoods, Inc., *F/Vs Northwest Enterprise, Aleutian Enterprise, Ocean Enterprise, Pacific Enterprise Alaskan Enterprise, Westward Wind, Arctic Enterprise, Skipbladnir*	500,000	1,000,000	3,000,000							4,500,000
Columbia-Wards Fisheries, *Kodiak*		692,981								692,981
Dutch Harbor Seafoods, Ltd., *F/Vs Galaxy, Viceroy, Omnisea*	1,041,989	862,459	4,396,127							6,300,575
Gayle Wind Seafoods, *Petersburg*				27,757	4,381					32,138
Icicle Seafoods, *Petersburg*	465,626	372,655		795,797						1,634,078
Seward	49,399	277,576		36,414						363,389
Homer		1,703,916		1,043,145	1,253,014					4,000,075
Louie Wagner, *F/V Lady Lee Dawn*				684	698					1,382
Pelican Seafoods, Inc., *M/V Akutan*	530,000	14,000	1,100,000							1,644,000
Sand Point	890,000	1,800,000	980,000	65,000						3,735,000
Pelican	610,000	950,000		540,000						2,100,000
Peter Pan Seafoods, Inc., *King Cove*	137,779	866,595		120,083						1,124,457
Sea Alaska Products *all locations*	951,777	7,630	3,775,054			422,920				5,157,381
Silver Lining Seafoods, *Ketchikan*	7,000				30,000				9,000	46,000
Sitka Sound Seafoods, *Sitka*	26,859	369,982		434,674						831,515
Universal Seafoods Ltd., *Dutch Harbor*	818,906	557,166	5,266,851							6,642,923
Ursin Seafoods, Inc., *Kodiak*	693,000	2,194,000	152,300							3,039,300
Western Alaska Fisheries, *Kodiak*	200,000	2,100,000•		517,000		45,000				2,862,000
TOTAL ALASKA	6,934,335	13,776,960	18,670,332	3,593,315	1,288,093	467,920			9,000	44,739,955
WASHINGTON										
Associated Seafoods Co., *Aberdeen*							152,670	7,000,000		7,152,670
Blau Oyster Company, *Bow*								191,013		191,013
Rock Point Oyster Company, *Bow*							44,000	7,500*		51,500
TOTAL WASHINGTON							196,670	7,198,513		7,395,183
OREGON										
Sportsmen's Cannery, *Winchester Bay*				6,300						6,300
TOTAL OREGON				6,300						6,300
CALIFORNIA										
American Fish & Seafood Co., *Los Angeles*						66,000			6,000p	72,000
Meredith Fish Company, *Sacramento*				480,000						480,000
TOTAL CALIFORNIA				480,000		66,000			6,000	552,000

* = gallons p = pieces •includes opilio

Source: *Seafood Business Report*

red kings, leading one biologist to speculate that "maybe the bottom has been reached" in king crab catch limits.

By January 31, cold-storage holdings of king crab sections were 7.3 million pounds, 3 million less than the holdings of one year earlier. These inventories were augmented somewhat by winter production in the Adak region, a fishery expected to produce less than 1 million pounds of red kings and about 3 million pounds of brown. Inventories of crabmeat on January 31 were 886,000 pounds, down from year-ago levels of 1.1 million pounds.

• Harvests of *bairdi* tanner crab in 1985 were only slightly less than 1984 levels, but down substantially from the previous season's highs of 40 to 50 million pounds. The Bering Sea, historically a motherlode for *bairdi,* was closed for the first time last year to protect dwindling stocks. Kodiak, with historic catches second only to those in the Bering Sea, has seen a steady decline in deliveries as well. The Kodiak season was expected to close in late February with a total catch of 8.5 million pounds. Total harvest for that area in 1984 was 14 million pounds. Catches of 8 million pounds had been reported as of mid-February.

During the winter season, Japanese buying in Kodiak was aggressive, immediate, and mostly in cash. Prices were 50 to 70 cents higher than last year's, putting wholesale prices for clusters FOB Seattle at $4.25 to $4.35. One major producer of *bairdi* had not sold any product by January 30, and prices could very well rise once the volume of Japanese purchases is known. Throughout 1985, wholesale prices for *bairdi* remained stable, and the product continued to fill markets established a year earlier. But two things could change that situation this spring and summer: strong Japanese interest may funnel more *bairdi* to the

Alaska Shellfish Landings

(THOUSANDS OF POUNDS)

YEAR	KING CRAB	TANNER CRAB	DUNGENESS CRAB	SHRIMP
1961	43,412	7	4,592	15,981
1962	52,782	1	8,989	16,943
1963	78,740		12,084	15,126
1964	86,720	14	12,709	7,727
1965	131,671		8,895	16,819
1966	159,202		5,053	28,193
1967	127,716	118	11,598	41,812
1968	82,037	3,247	13,247	42,077
1969	57,730	11,206	11,304	47,851
1970	52,061	14,473	9,696	74,256
1971	70,703	12,880	3,749	94,891
1972	74,427	30,135	5,448	83,830
1973	76,824	61,719	6,423	119,964
1974	95,214	63,906	3,818	108,741
1975	97,629	46,857	3,034	98,984
1976	105,899	80,771	1,546	128,682
1977	99,600	98,500	1,160	117,000
1978	122,930	130,630	7,170	73,330
1979	149,660	130,589	6,334	50,613
1980	185,498	121,666	5,912	52,308
1981	88,054	107,474	14,901	27,672
1982	39,717	70,613	15,886	17,164
1983	25,874	61,081	11,791	7,455
1984	17,190	48,770	9,949	10,161
1985	15,362	85,742	9,763	4,565

Note: 1985 data are preliminary. Source: ADF&G

Pacific Coast Shrimp Landings

(POUNDS)

YEAR	ALASKA	BRITISH COLUMBIA	WASHINGTON	OREGON	CALIFORNIA	TOTAL
1961	15,980,550	1,206,000	1,436,599	1,455,900	2,006,274	22,085,323
1962	16,943,120	1,663,000	1,367,441	2,750,400	1,786,289	24,510,250
1963	15,126,950	1,768,000	956,105	3,114,700	2,095,278	23,081,033
1964	7,726,750	1,052,000	314,130	5,477,400	980,608	15,550,888
1965	16,818,941	1,755,000	23,468	1,748,000	1,425,875	21,771,284
1966	28,192,621	1,682,000	282,947	4,751,300	1,213,959	36,122,827
1967	41,812,552	1,696,000	1,028,744	10,373,956	1,404,821	56,316,073
1968	42,077,104	1,568,000	1,163,864	10,163,864	2,223,205	58,008,431
1969	47,850,560	2,118,700	1,425,286	10,477,945	2,951,800	64,824,255
1970	74,256,326	1,537,800	925,000	13,735,000	4,044,640	94,498,766
1971	94,891,304	735,000	678,000	9,291,000	3,074,000	108,669,304
1972	83,830,064	793,656	1,582,000	20,731,151	2,500,000	109,436,871
1973	119,963,729	1,728,406	5,271,000	24,517,194	1,239,976	152,720,305
1974	108,741,434	2,649,929	9,300,000	20,313,760	2,360,000	143,365,123
1975	98,535,031	1,728,406	10,200,000	24,083,568	4,997,000	139,544,005
1976	129,011,047	7,722,713	9,224,898	25,456,007	3,470,000	173,884,665
1977	116,871,605	6,175,084	11,400,000	48,580,070	15,663,451	198,690,210
1978	73,292,614	3,459,017	12,298,000	56,666,109	13,163,243	158,878,983
1979	50,613,000	1,578,493	12,135,000	29,586,586	4,922,917	98,835,996
1980	51,574,692	1,446,217	12,743,221	30,152,030	4,242,754	100,158,914
1981	27,972,242	2,070,119	10,055,343	25,923,589	4,098,013	70,119,306
1982	17,018,000	1,091,277	4,998,966	18,461,988	4,250,000	45,820,231
1983	7,455,000	1,632,400	5,801,000	6,547,073	1,133,000	22,568,473
1984	10,160,800	1,738,000	3,510,000	4,843,571	1,250,000	21,502,371
1985	4,564,637	2,133,322	9,218,000	14,781,742	2,900,000	33,597,701

Note: 1985 data are preliminary. Sources: State and provincial fisheries agencies

1985 Alaska Shellfish Landings by Area

(THOUSANDS OF POUNDS)

AREA	KING CRAB	DUNGENESS CRAB	TANNER CRAB *opilio*	TANNER CRAB *bairdi*	HAIR CRAB	TRAWL SHRIMP	POT SHRIMP	SCALLOPS	OTHERS
Southeast	554,329	2,646,969		1,139,030		476,112	493,564	21,496	197,971
Prince William Sound	50,000	1,080,000				449,000	227,000		60,000*
Cook Inlet		1,403,275		2,790,627		1,676,003	78,710	11,810	352,983
Kodiak	63,647	4,153,877		11,997,701		1,159,916	4,332	45,786	36,766
Chignik		59,481		375,476				305	425
South Peninsula		402,777		2,549,686					776
Dutch Harbor	1,915,128	16,750		165,469	481			597,680	
Adak/Western Aleutians	5,233,579			66,339	395				
Bering Sea	2,949,874		63,496,112	3,161,468	59,856				
Norton Sound	427,000								
Bristol Bay	4,168,547								1,450
TOTAL	15,362,104	9,763,129	63,496,112	22,245,796	60,732	3,761,031	803,606	677,077	650,371

*razor clams
Note: 1985 data are preliminary
Source: ADF&G

Pacific Coast Dungeness Crab Landings

(POUNDS)

SEASON	ALASKA*	BRITISH COLUMBIA*	WASHINGTON	OREGON	CALIFORNIA	TOTAL
1960-61	4,591,000	4,284,000	7,388,000	10,816,000	12,446,000	39,525,000
1961-62	8,989,000	2,444,000	5,675,000	5,813,000	3,987,000	26,908,000
1962-63	12,084,000	3,738,000	5,105,000	3,546,000	2,342,000	26,815,000
1963-64	12,708,000	4,302,000	5,043,000	3,540,000	1,998,000	27,591,000
1964-65	8,895,000	3,501,000	7,715,000	6,221,000	4,749,000	31,081,000
1965-66	5,053,000	4,538,000	11,649,000	10,187,000	10,419,000	41,846,000
1966-67	11,597,000	5,295,000	9,291,000	9,428,000	10,705,000	46,316,000
1967-68	13,242,000	4,373,000	11,736,000	10,215,000	13,158,000	52,724,000
1968-69	11,304,000	3,705,000	19,250,000	11,965,000	13,685,000	59,909,000
1969-70	9,697,000	2,548,000	18,675,000	13,849,000	15,564,000	60,333,000
1970-71	3,749,000	1,963,000	13,211,000	14,735,000	8,501,000	42,159,000
1971-72	5,448,000	1,975,321	10,095,000	6,780,000	2,875,000	27,213,321
1972-73	6,423,000	2,579,382	5,583,000	3,143,000	1,500,000	19,228,382
1973-74	3,818,000	2,502,221	4,604,000	3,462,000	880,000	15,266,221
1974-75	3,034,000	2,513,244	5,896,000	3,335,000	1,816,000	16,594,244
1975-76	1,523,000	2,193,577	9,885,000	9,099,000	17,410,000	40,110,577
1976-77	1,181,000	2,270,738	14,023,000	16,200,000	26,404,000	60,078,738
1977-78	7,215,000	2,592,609	9,237,000	12,501,274	13,900,000	45,445,883
1978-79	6,374,932	2,599,223	7,979,403	16,423,011	8,236,142	41,612,711
1979-80	5,905,290	3,750,024	6,546,544	18,278,981	13,700,000	48,180,839
1980-81	14,901,177	2,903,458	2,689,142	9,534,820	11,865,000	41,893,597
1981-82	15,815,000	3,386,266	2,564,632	8,751,206	10,500,000	41,017,104
1982-83	11,791,000	2,112,000	6,708,000	4,345,105	5,229,002	30,185,107
1983-84	9,949,000	1,155,000	4,747,000*	4,678,124	5,560,000	26,089,124
1984-85	9,763,129	2,481,077	4,605,000	4,916,283	4,750,000	26,515,489

*Latest calendar year
Note: 1985 data are preliminary. Source: State and provincial fisheries agencies

export market, and the continued shortage of king crab may spur buyers to use *bairdi* as a substitute. In addition, ex-vessel prices on Kodiak *bairdi* were $1.75 in late January, up 5 cents from the start of the season. This compares with last year's ex-vessel price of $1.30 per pound.

• *Opilio* harvests in the Pribilof Islands and southeastern Bering Sea reached 11.5 million pounds by late January. Projected catch levels are 57 million pounds for 1986: 20 million from the northern district of the Bering Sea, 28 million from the Pribilofs, and 9 million from the southeastern region. There appears to be no danger to the vast population of *opilio* in the Bering Sea.

With wholesale prices for *opilio* remaining firm throughout the year, sales movement was steady. As with other seafood, value-added forms of the product have gained popularity, and more processors supplied scored leg and claw clusters to both retail and foodservice markets. Prices showed little increase, except for some larger-sized portions, which were sold as a substitute for the scarce *bairdi*.

For the first time in at least four years, exports of tanner crab showed an upward trend. Export volumes by December 1, 1985, were more than 21 million pounds, already almost 7 million pounds above 1984 totals. Inventories in this country were 5 million pounds of sections on January 31, 1.9 million pounds more than one year earlier. Cold-storage holdings of tanner crabmeat were reported at only 823,000 pounds, down 40 percent from the same time in 1985.

• Cold-water shrimp landings were down by more than half in Alaska, but were up in Washington, Oregon, and California. After two years of skimpy landings (4 to 5 million pounds) in Oregon, shrimpers in that state hauled in nearly 15 million pounds last year. Shrimp prices in 1985 changed little for the cold-water varieties, which continue to compete with lower-priced imports.

• Although landings of Dungeness crab were up in 1985 for British Columbia, overall Pacific landings were nearly identical to the previous year's. Wholesale prices were high during the Oregon–Washington season in the winter of 1985, due to light hauls, and remained so throughout the year. With ex-vessel prices again at the $1.75-per-pound level in Oregon in December, wholesale prices should be at levels similar to last year's during spring and summer. More than 4 million pounds of Dungeness were caught in Oregon during December last year, which biologists estimated to be 75 percent of the season's total. Cold-storage holdings of Dungeness crab were 3.1 million pounds on January 31, nearly 1 million pounds more than those of a year ago. ■

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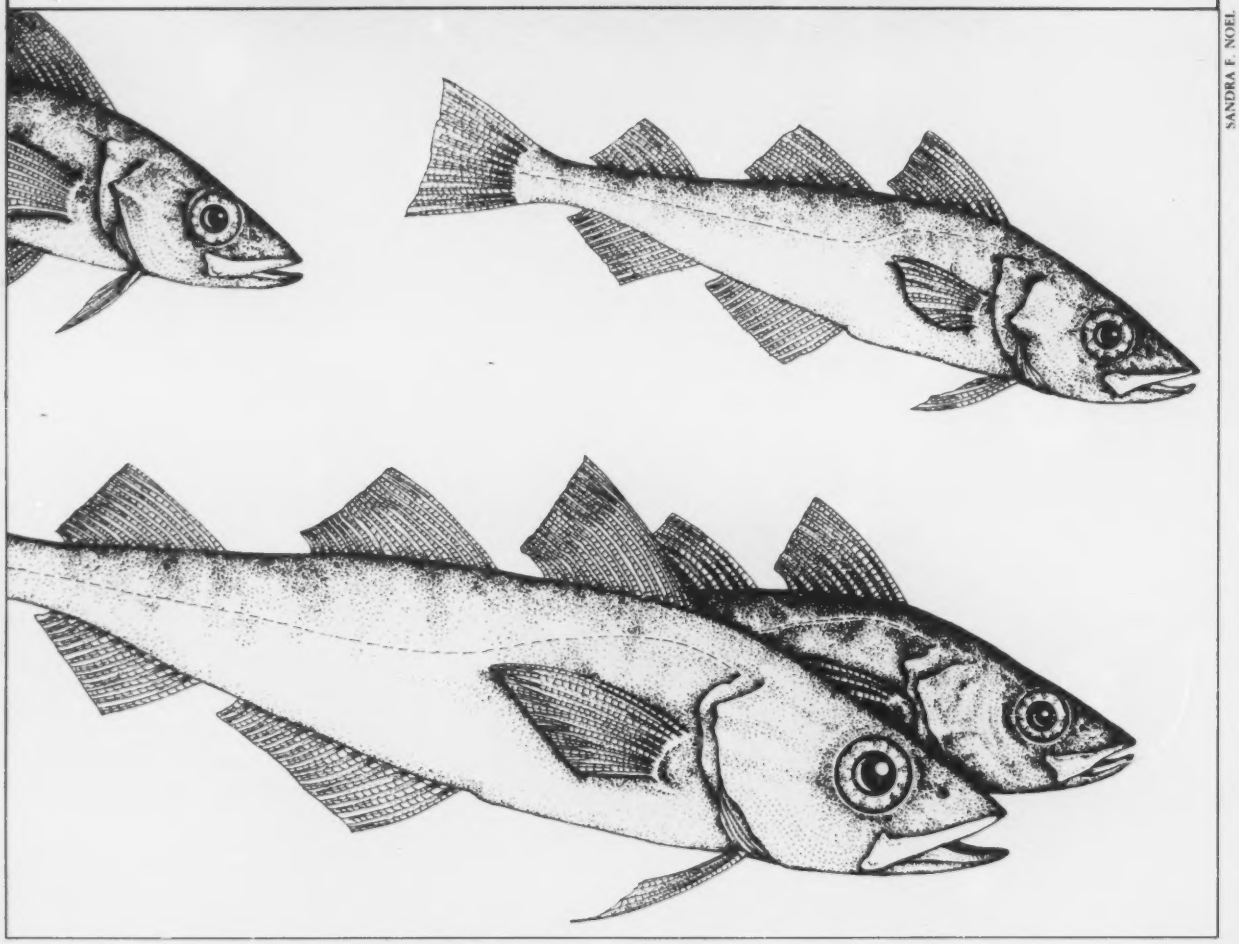
BOTTOMFISH



SANDRA F. NOEL

More groundfish to U.S. processors

There were two remarkable developments in the West Coast groundfish industry last year, both of which will have an impact on the domestic market this season.

The first was the preponderance of fresh halibut available throughout the season, combined with steady demand for fresh. The result was little product for the freezer and significantly altered buying patterns.

The second, more far-reaching, change came in mid-December at a meeting of the North Pacific Fisheries Management Council, when harvest estimates established for domestic fishermen and processors exceeded those of past years by nearly 1 million metric tons. In the Gulf of Alaska, U.S. demand for sablefish, Pacific ocean perch, and other rockfish has effectively eliminated foreign fishing for those species. A small foreign longline fishery for Pacific cod will be permitted in this area. Council-approved optimum-yield (OY) figures reflect concerns for stocks of flounder, Pacific ocean perch, and some rockfish, but sablefish and Pacific cod OYs were increased to 15,000 mt and 75,000 mt respectively.

The greatest change in OY figures in the Gulf was for pollock, which has declined rapidly in recent years. Biologists suggest that the cyclical pattern of pollock stocks will reach its lowest level this year, before rebuilding over the next several years.

In the Bering Sea–Aleutians, total-catch allocations to domestic processors were more than double last year's, and joint-venture allocations increased by 128,000 mt to 1,008,092 mt. Foreign fishing allocations for 1986 are restricted to pollock, flatfish, and Pacific cod and confined mainly to the Bering Sea.

Industry estimates put domestic processing volume at about 460,000 mt for 1986 — more than triple last year's production. U.S. harvesters will deliver an estimated 1.1 million mt to foreign processors in joint-venture operations, an increase over last year's total of 880,461 mt. Joint ventures with six countries have been approved: 12 with Japan, 14 with Korea, 1 with the Soviet Union, 2 with Taiwan, and 3 each with Poland and China. Foreign fishery production is expected to drop from 55 percent to

(Continued page 94.)

Alaska Bottomfish Catch (METRIC TONS)

		GULF OF ALASKA 1984	GULF OF ALASKA 1985	BERING SEA & ALEUTIANS 1984	BERING SEA & ALEUTIANS 1985	TOTAL 1984	TOTAL 1985
Pollock	Joint Ventures	207,104	237,835	237,008	375,922	444,112	613,761
	Domestic Processors	329	19,991	10,618	35,339	10,947	55,330
	Foreign Catch	99,259	29,959	932,990	788,419	1,032,249	818,378
	Total	306,692	287,789	1,180,616	1,199,680	1,487,308	1,487,469
Sablefish	Joint Ventures	528	225	348	105	876	330
	Domestic Processors	8,594	11,378	1,678	3,076	10,272	14,454
	Foreign Catch	1,107	38	1,923	247	3,030	285
	Total	10,229	11,641	3,949	3,428	14,178	15,069
Pacific Cod	Joint Ventures	4,650	2,267	30,771	40,840	35,421	43,107
	Domestic Processors	2,673	2,477	43,878	45,239	46,551	47,716
	Foreign Catch	15,897	9,122	58,510	54,445	74,407	63,567
	Total	23,220	13,866	133,159	140,524	156,379	154,390
Flatfish	Joint Ventures	3,448	2,458	50,171	171,819	53,619	174,277
	Domestic Processors	397	125	24	35	421	160
	Foreign Catch	3,033	170	186,108	147,019	189,141	147,189
	Total	6,878	2,753	236,303	318,873	243,181	321,626
Pacific Ocean Perch	Joint Ventures	1,734	256	579	446	2,313	702
	Domestic Processors	119	789	1,281	810	1,400	1,599
	Foreign Catch	2,599	8	726	73	3,325	81
	Total	4,452	1,053	2,586	1,329	7,038	2,382
Rockfish	Joint Ventures	302	55	43	17	345	72
	Domestic Processors	836	995	33	16	869	1,011
	Foreign Catch	579	5	192	45	771	50
	Total	1,717	1,055	268	78	1,985	1,133
Atka Mackerel	Joint Ventures	585	1,846	35,943	37,766	36,528	39,612
	Domestic Processors	31	0	0	0	31	0
	Foreign Catch	536	2	112	1	648	3
	Total	1,152	1,848	36,055	37,767	37,207	39,615
Other	Joint Ventures	1,274	2,254	2,679	6,346	3,953	8,600
	Domestic Processors	100	1,211	15	1,021	115	2,232
	Foreign Catch	695	105	10,664	7,728	11,359	7,833
	Total	2,069	3,570	13,358	15,095	15,427	18,665
TOTAL	Joint Ventures	219,625	247,200	357,542	633,261	577,168	880,461
	Domestic Processors	13,079	36,966	57,527	85,536	70,606	122,501
	Foreign Catch	123,705	39,409	1,191,225	997,977	1,314,929	1,037,385
	Grand Total	356,409	323,575	1,606,294	1,716,774	1,962,703	2,040,347

Note: 1985 data are preliminary. Source: Pacific Fisheries Information Network

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1985 West Coast Frozen Food Fish

(POUNDS)

COMPANY AND LOCATION	HALIBUT	BLACK COD	PACIFIC COD	ROCKFISH	FLATFISH	ROE HERRING	TOTAL
Alaska Specialty Seafood, *Ketchikan*	20,000			50,000			70,000
Aleutian Dragon Fisheries, *Chignik*						21,800	21,800
Annette Island Packing Co., *Metlakatla*	92,356	18,851				1,241,619	1,352,826
F/V Arctic	18,792	40,000		8,716			67,508
Arctic Alaska Seafoods, Inc.							
F/Vs Northwest Enterprise, Aleutian Enterprise, Ocean Enterprise, Arctic Enterprise, Pacific Enterprise, Alaskan Enterprise, Westward Wind, Skipbladnir		5,000,000	50,000,000	5,000,000	10,000,000		90,000,000[1]
Baranof Fisheries, *F/V Baranof*		4,200,000					4,200,000
Columbia-Wards Fisheries, *Alitak*		27,366					27,366
Port Bailey	60,207						60,207
Copper River Fishermen's Cooperative, *Cordova*	175,399	42,417					217,816
Courageous Fisheries, *F/V Courageous*		1,800,000					1,800,000
Gayle Wind Seafoods, *Petersburg*	1,350	324	108	27,846	3,039		32,667[2]
Icicle Seafoods, Inc., *F/V Arctic Star*						8,484,000	8,484,000
F/V Bering Star						4,210,000	4,210,000
Petersburg	1,693,148	929,887	2,700	1,820		2,816,000	5,443,555
Seward	3,919,092	2,999,611	400	33,540		202,000	7,154,643
Homer	2,042,295	50,234				3,082,000	5,174,529
International Seafoods of Alaska, Inc., *Kodiak*	795,000	36,000	63,500		6,000		1,301,500
Kemp Pacific Fisheries, *all locations*						7,000,000	7,000,000
Northern Products Corporation, *Hoonah*	614,191	137,150					751,341
Pelican Seafoods Inc., *M/V Polar Ice*						1,280,000	1,280,000
Sand Point	1,380,000	119,000				1,800,000	3,299,000
Pelican	1,640,000	940,000	55,000	170,000	22,000	22,000	2,849,000
Peter Pan Seafoods, Inc., *Port Moller*						768,113	768,113
King Cove	83,465	56,050					139,515
Seafood Producers/Quality Seafoods, *Sitka*	1,659,361	1,016,976		94,347		1,554,465	4,325,149
Silver Lining Seafoods, *Ketchikan*	237,000	150,000		413,000			800,000
Sitka Sound Seafoods, *Sitka*	2,268,145	2,189,883	15,738	441,540		2,468,480	7,383,786
Universal Seafoods Ltd., *Dutch Harbor*	985,072	1,066,390	3,398,261				5,449,723
Ursin Seafoods, Inc., *Kodiak*	1,099,600		103,000			545,000	1,747,600
Western Alaska Fisheries, *Kodiak*	2,400,000	250,000	4,400			1,005,000	3,659,400
TOTAL ALASKA	**21,184,473**	**21,070,139**	**53,643,107**	**6,240,809**	**10,031,039**	**36,500,477**	**169,071,044**
WASHINGTON							
Arrowac Fisheries, Inc./Merco Intertrade, Inc., *Bellingham*	175,000	250,000		10,000			8,035,000[4]
Marine Resources Co. International, *Seattle*			48,840,000	154,000	270,329,400		566,673,800[5]
Pro Fish International, *Seattle*			5,060,000		12,320,000		101,860,000[6]
TOTAL WASHINGTON	**175,000**	**250,000**	**53,900,000**	**164,000**	**282,649,400**		**676,568,800**
OREGON							
Sportsmen's Cannery, *Winchester Bay*			750				25,750[6]
TOTAL OREGON			**750**				**25,750[6]**
CALIFORNIA							
American Fish & Seafood Company, *Los Angeles*				66,000			66,000
David B. Dalby, L.D.S. Cannery, *San Diego*							386,961[7]
Long Beach Seafood Co., *Long Beach*	2,100,000						2,100,000
Meredith Fish Co., *Sacramento*		200,000	2,000,000	1,900,000	5,000,000		9,100,000
TOTAL CALIFORNIA	**2,100,000**	**200,000**	**2,000,000**	**1,966,000**	**5,000,000**		**11,652,961**

[1] = includes 20,000,000 lbs. of pollock
[2] = does not include 9,169 lbs. gutted yelloweye; 1,845 lbs. H&G yelloweye; 6,228 lbs. Eastern Cut yelloweye; 1,523 lbs. yelloweye fillets; 3,163 lbs. H&G lingcod; and 344 lbs. halibut fillets.
[3] = includes 401,000 lbs. of pollock
[4] = includes 3,500,000 lbs. of whiting; 4,000,000 lbs. of dogfish; and 100,000 lbs. of pollock
[5] = includes 209,899,800 lbs. hake; 28,921,206 lbs. atka mackerel; and 8,529,400 lbs. of pollock
[6] = includes 25,000 lbs. albacore tuna
[7] = tuna
[8] = includes 28,600,000 lbs. pollock; 33,000,000 lbs. hake; and 22,880,000 lbs. atka mackerel
Source: *Seafood Business Report*

Pacific Bottomfish Landings

(THOUSANDS OF POUNDS)

	WASHINGTON[1]			OREGON			CALIFORNIA			BRITISH COLUMBIA		
	1983	1984	1985	1983	1984	1985	1983	1984	1985	1983	1984	1985
Cod, Pacific	23,407	35,121	15,428	197	176	85		4	2	10,171	6,706	4,658
Dogfish	5,344	7,620	5,377	2	1					1,562	1,705	2,500
Flounder, arrowtooth	3,337	4,280	4,305	1,192	919	1,488	55	71	83	145[2]	315[2]	124[2]
Flounder, starry	1,132	684	799	433	237	783	101	469	380			
Groundfish, other	41[6]	828	666	160[6]	13	11		353	324	761[6]	809[6]	751[6]
[3]Halibut	3,609	5,571	6,858	435	1,055	606				4,103	6,733	8,011
Lingcod	3,541	4,738	5,559	3,831	2,331	2,236	1,947	2,095	1,493	8,283	7,847	11,718
Pacific Ocean perch	902	3,806	3,768	5,192	1,657	1,607	117	91	144	[4]	[4]	12,912
Pollock	1,161	9,068	1,758		1					2,402	913	2,130
Rockfish, other	26,586	12,257	14,062	35,469	15,217	16,409	35,028	37,060	30,788	26,577[5]	26,059[5]	21,044[5]
Rockfish, widow	7,271	3,688	3,575	4,888	11,835	9,474	7,617	6,131	6,669			
Sablefish	7,890	10,491	8,766	10,235	10,660	11,504	14,320	10,632	11,244	9,502	8,247	9,117
Sole, Dover	6,654	7,481	6,307	18,699	13,466	11,400	18,484	21,547	25,626	6,008[7]	6,677[7]	5,424[7]
Sole, English	2,299	2,503	2,231	2,015	994	981	2,556	2,098	2,228			
Sole, petrale	1,160	1,076	925	2,435	1,518	991	1,239	1,302	1,693			
Sole, rex	398	356	286	1,427	1,211	824	1,377	1,253	1,867			
Sole, rock	209	184	163	10	5	1	11	12	19			
Whiting	20,842	14,440	20,719	142	746	1,950	2,156	5,148	6,605	6,837	3,515	2,655

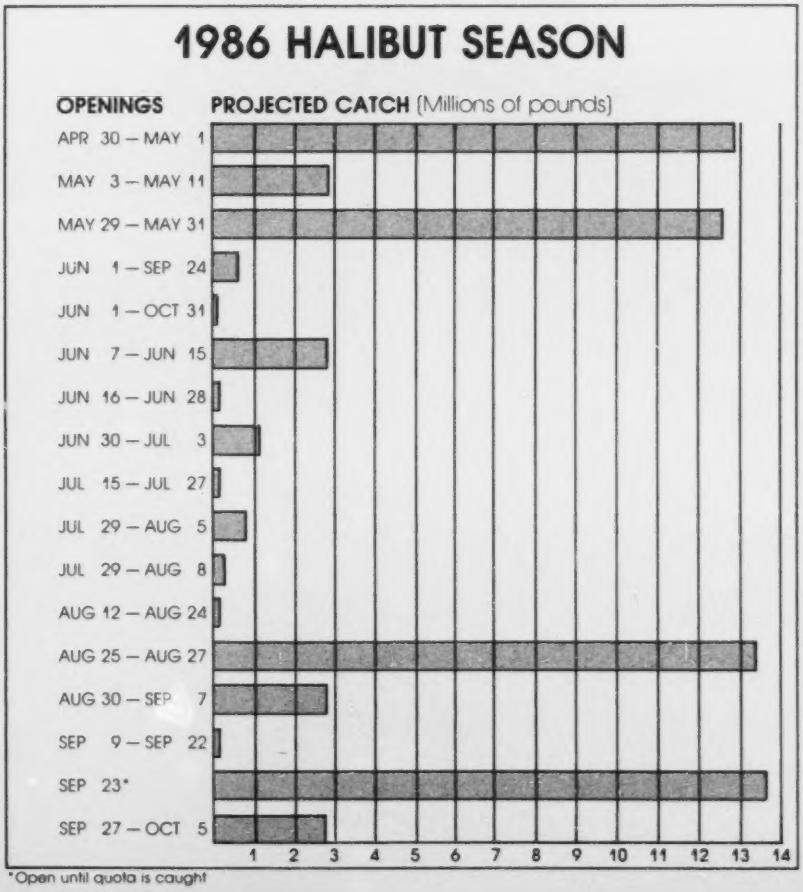
[1]Includes Canadian catch landed in U.S. ports [2]All flounder [3]heads-off weight [4]See Rockfish, other [5]All rockfish [6]Skate [7]All sole

Source: State and provincial fisheries agencies, Pacific Fisheries Information Network

30 percent of the total catch.

With the U.S. industry's slice of 70 percent of the groundfish pie, the domestic market should see more of these species available than ever before. Some industry observers say that because joint ventures were the big winners in the 1986 allocation schedule, export markets will benefit more than domestic markets. A comparison of production and export figures indicates that the impact on foreign markets is small, compared with total processed volume. Alaskan production of pollock, for instance, rose to a record high of 669,000 mt last year, while exports (which more than tripled in that period) totaled 1.2 million pounds. Cold-storage holdings of Alaska pollock blocks were 6.4 million pounds in late January, about 1.4 million pounds under 1985 levels.

• Pollock is the primary ingredient in surimi, and with directed Japanese foreign fishing prohibited on this species until significant progress is made on the U.S./Japan high-seas salmon talks, supplies of raw product are tightening. Prices for sea-processed surimi were increased by two major Japanese pro-


1986 HALIBUT SEASON
OPENINGS
PROJECTED CATCH (Millions of pounds)
APR 30 — MAY 1
MAY 3 — MAY 11
MAY 29 — MAY 31
JUN 1 — SEP 24
JUN 1 — OCT 31
JUN 7 — JUN 15
JUN 16 — JUN 28
JUN 30 — JUL 3
JUL 15 — JUL 27
JUL 29 — AUG 5
JUL 29 — AUG 8
AUG 12 — AUG 24
AUG 25 — AUG 27
AUG 30 — SEP 7
SEP 9 — SEP 22
SEP 23*
SEP 27 — OCT 5
1 2 3 4 5 6 7 8 9 10 11 12 13 14

*Open until quota is caught

Pacific Halibut Catch

(THOUSANDS OF POUNDS)

YEAR	U.S.	CANADA	TOTAL
1950	30,182	18,884	57,283
1951	35,058	21,020	56,078
1952	37,614	24,719	62,333
1953	34,127	25,738	59,865
1954	43,680	27,526	71,206
1955	36,962	22,148	59,110
1956	41,909	25,596	67,505
1957	36,641	24,714	61,355
1958	36,295	28,918	65,213
1959	40,821	30,894	71,715
1960	38,350	33,613	71,963
1961	40,065	29,466	69,531
1962	40,446	34,673	75,119
1963	34,290	37,133	71,432
1964	26,379	33,588	59,967
1965	30,486	32,987	63,473
1966	30,359	31,972	62,331
1967	29,948	25,669	55,658
1968	19,371	29,469	48,840
1969	25,008	33,597	58,605
1970	25,783	29,155	54,938
1971	21,158	25,496	46,654
1972	20,483	22,535	43,018
1973	17,290	14,410	31,700
1974	13,938	7,368	21,306
1975	16,259	11,357	27,616
1976	15,539	11,996	27,535
1977	13,101	8,767	21,868
1978	13,383	8,605	21,988
1979	15,868	6,659	22,527
1980	14,264	7,602	21,866
1981	20,078	5,654	25,732
1982	23,470	5,538	29,008
1983	32,948	5,436	38,384
1984	35,916	9,054	44,970
1985	45,739	10,172	55,911

Note: 1985 data are preliminary.

Source: International Pacific Halibut Commission

ducers in January. This could raise U.S. domestic retail prices as early as March and heighten demand for domestically produced surimi.

• The marketing story of the year centers on halibut, traditionally marketed frozen throughout the year, with fresh available only in spurts during the season. Last year changed all that, as halibut openings in Alaska and British Columbia were staggered between April and September and shortened to avoid product gluts. The market welcomed fresh halibut with open arms, and processors responded to the higher prices for fresh by putting very little product in the freezer. Wholesale prices began between $1.35 and $1.40 last spring, then jumped quickly to break the $2.00 level shortly after the first spate of openings in April and May. In spite of continued high landings, prices for all product forms continued a steady increase, up to $2.10–$2.15 for 40/60 whole fish in late December. The price continued to gain ground through the winter, and early-February prices were reported to be between $2.25 and $2.35.

The trend to steaking and filleting was strong last year and should continue this season. For most processors, prices on value-added product justified the shift from whole fish.

The International Pacific Halibut Commission has increased the catch quota to 66.4 million pounds, well above last year's final harvest of 55.9 million pounds. This season's catch limit is the largest since 1963 and illustrates the commission's success in rebuilding halibut stocks. Harvesting periods will be similar to last year's, ranging from late April through September. With 11 million pounds more hitting the pipeline this spring, one would expect starting wholesale prices to be below last year's early prices. But some processors feel the continued strength in prices, combined with low inventory and strong Japanese demand, will result in starting prices 10 to 15 cents higher than last year's. ■

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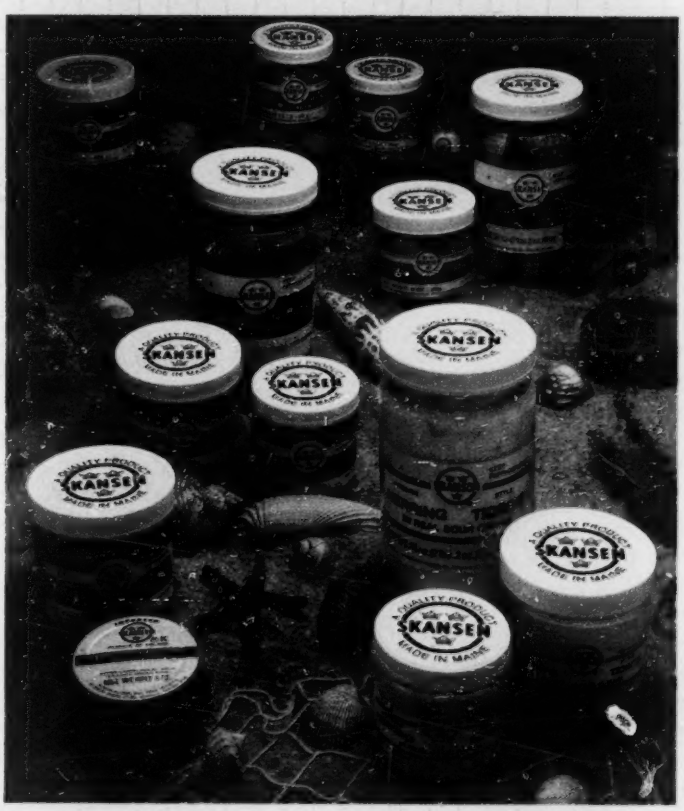

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Circle Reader Inquiry #117

Alaska Pollock Comes Home To America

(Installment #2)

"Dear Ted. Thought you might be interested in the latest adventures of Janie, the intrepid photojournalist, last seen feasting on great seafood in the middle of South Dakota.

An early blizzard sent me and the jeep scurrying to Florida in search of sunshine and southern cooking!

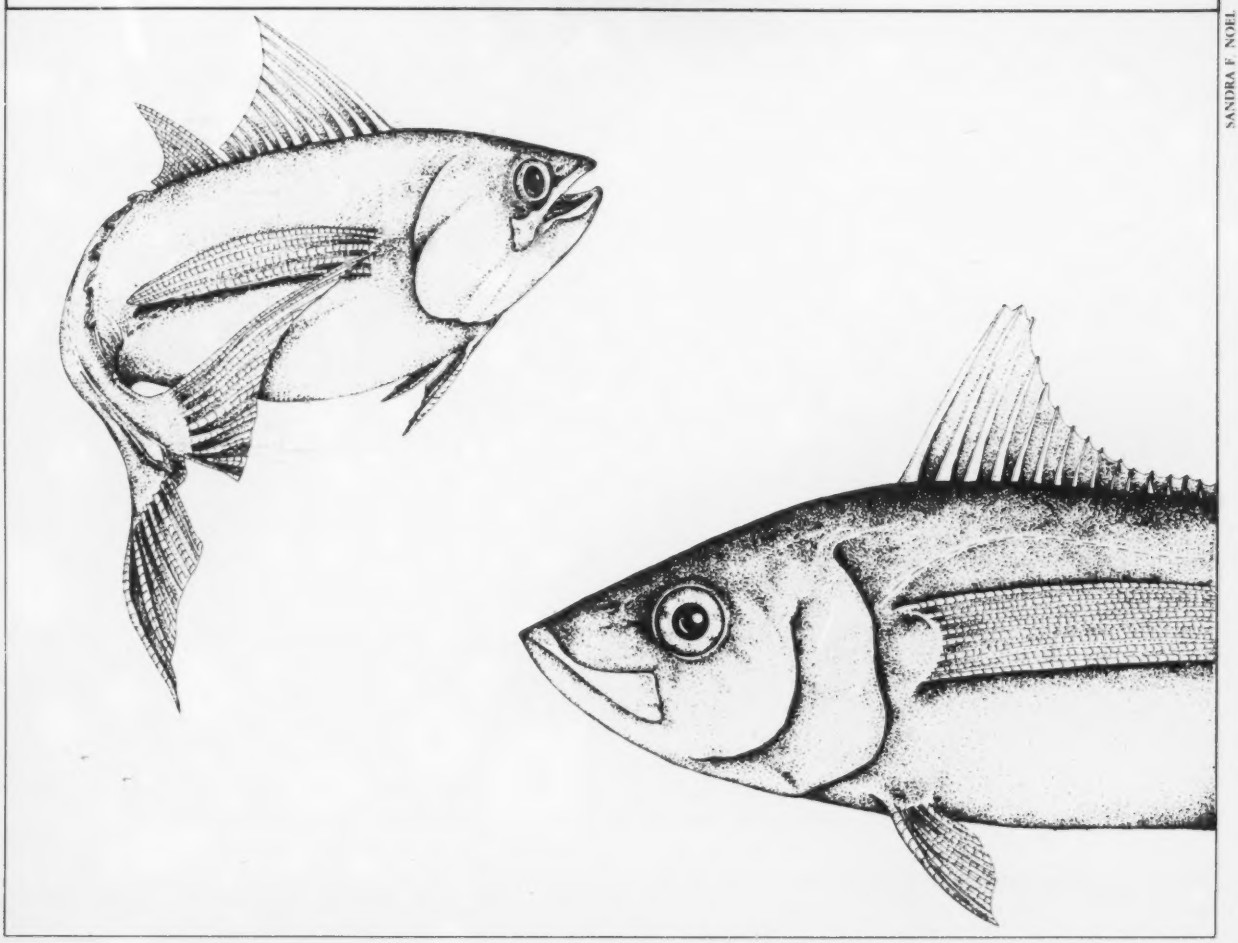
Imagine my surprise when I discovered this great little hideaway in Orlando called "Gus' Villa Rosa," where one of the featured items is—you guessed it!—Alaska pollock, cajun-style.

The secret to this hot and spicy dish is Gus' secret cajun spices, along with the mild and delicious Alaska pollock. Gus also smothers the fish in pesto for another smash hit.

Looks like Alaska pollock is starting to turn up in restaurants everywhere. Stay tuned! Regards to the gang.
Janie."

Circle Reader Inquiry #2

TUNA



SANDRA F. NOEL

California industry probes fresh markets

For California's tuna industry, the legacy of the 1980s will likely be good fishing and soft markets. And 1985 fit the pattern. Record catches of yellowfin in the eastern Pacific (east of the Hawaiian Islands) last year were offset by steadily dwindling cannery prices.

Star-Kist Foods, a corporate giant that controls 40 percent of the international tuna market, heads the list of packers who have relocated in Puerto Rico and American Samoa, leaving California's 80-year-old tuna industry near ruin. Star-Kist, the last of the three major tuna canners, moved its operations overseas in October 1984.

In addition, an unprecedented influx of cheap, imported tuna has sent cannery prices skidding, causing several "super seiner" tunaboats to suspend operations over the past two years.

• Since 1980, U.S. canned-tuna imports have swelled from 114 million to 213 million pounds a year. At first, domestic packers tried to compete with cheap, foreign-packed tuna; then, between 1982 and 1984, they moved overseas and joined the fray. Only one canner, California Home Brands, is packing in San Pedro, and its 1985 production was "insignificant," says Augie Felando, president of the American Tunaboat Association.

(Continued page 102.)

1985 United States Tuna Pack

(STANDARD CASES*)

REGION†	ALBACORE	LIGHTMEAT	TOTAL
California, Washington, Oregon, Rhode Island, Puerto Rico and American Samoa	6,485,000	21,159,000	27,644,000

*48 halves per case
Note: 1985 data are preliminary and estimated.
Source: NMFS
† Regional breakdown not available.

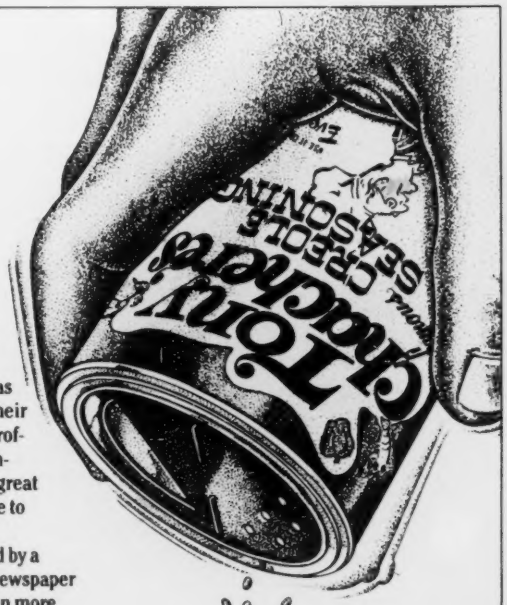
Continental Imports of Fresh and Frozen Tuna

(SHORT TONS)

YEAR	ALBACORE	BLUEFIN	SKIPJACK	YELLOWFIN	TOTAL
1961	15,602	639	5,172	30,572	61,985
1962	16,084	725	2,397	45,325	64,531
1963	8,488	1,179	4,674	24,720	39,061
1964	16,716	1,839	3,208	26,937	48,700
1965	22,189	415	2,858	19,686	45,148
1966	24,412	1,576	7,215	30,531	63,734
1967	21,749	1	2,170	13,332	37,252
1968	23,725	40	771	30,161	54,697
1969	22,829	185	1,449	18,241	42,704
1970	15,656	435	10,977	15,337	42,405
1971	12,986	1,292	26,209	9,633	50,120
1972	31,222	2,780	42,642	18,286	94,930
1973	24,376	3,663	89,199	23,386	140,624
1974	24,819	576	79,988	10,314	115,697
1975	7,066	802	21,351	13,549	42,768
1976	34,808	891	40,960	16,318	92,977
1977	8,810	1,085	64,223	20,110	94,228
1978	15,503	221	72,279	37,314	125,317
1979	13,312	54	68,490	24,737	106,593
1980	11,485		77,413	16,280	105,178
1981	14,600		50,763	19,348	84,711
1982	11,115		37,107	8,062	56,284
1983	5,616		41,450	4,415	51,481
1984	7,680		8,051	970	16,701
1985	9,185		11,727	2,372	23,656*

*Includes 371 st of unspecified tuna
Note: Data prior to 1976 are for California only.
Source: NMFS

Great taste in a shake.



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Circle Reader Inquiry #29

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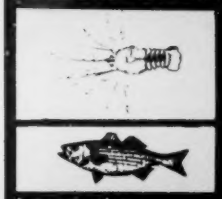

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Circle Reader Inquiry #51

United States Tuna Packs

(STANDARD CASES*)

YEAR	CALIFORNIA	OREGON AND WASHINGTON	HAWAII, PUERTO RICO, AM. SAMOA, MARYLAND	TOTAL
1960	10,714,911	1,473,540	3,116,983	15,305,434
1961	10,545,568	1,261,666	3,960,470	15,767,704
1962	10,511,164	1,471,189	5,035,575	17,017,928
1963	9,074,754	1,487,036	5,994,030	16,555,820
1964	9,292,629	1,503,283	6,893,091	17,689,003
1965	9,012,710	1,760,757	7,325,337	18,098,804
1966	9,613,331	1,540,670	8,799,566	19,953,567
1967	8,962,412	1,508,537	9,210,687	19,681,636
1968	9,042,920	1,778,382	9,190,388	20,011,690
1969	8,990,094	1,656,951	9,450,594	20,097,639
1970	10,567,515	1,588,905	9,906,920	22,063,340
1971	9,735,943	1,422,117	11,046,913	22,204,973
1972	13,011,296	1,887,008	16,311,798	31,210,102
1973	13,920,431	1,687,610	16,497,550	32,105,591
1974	14,331,606	1,862,093	17,170,234	33,363,933

YEAR	CONTINENTAL	HAWAII, PUERTO RICO AMERICAN SAMOA	TOTAL	YEAR
1975	13,025,544	13,776,107	26,801,651	1975
1976	15,921,290	14,383,199	30,304,489	1976
1977	12,605,000	15,054,907	27,660,237	1977
1978	16,591,000	19,989,132	35,580,132	1978
1979	14,222,000	17,559,000	31,781,000	1979
1980	14,287,759	16,220,963	30,508,722	1980
1981	13,233,951	18,520,177	31,754,128	1981
1982	9,512,000	15,096,000	24,608,000	1982
1983	10,409,000	20,706,000	31,115,000	1983
1984	8,885,000	22,161,000	31,046,000	1984
1985	7,819,000	19,502,000	27,321,000	1985

*48 halves per case
Note: 1975 begins new reporting system and is comparable only in annual totals. 1985 data are preliminary and estimated.
Source: NMFS

Felando says that 57 percent of the water-packed tuna that entered the United States last year came from Thailand, where labor is cheap (37 cents an hour), and overhead costs are low, owing to the absence of regulations that burden American canners.

Between March 1985 and January 1986, cannery prices for "premium" yellowfin (over 20 pounds) unloaded in American Samoa or Puerto Rico dropped from $805 per ton to $730 per ton. During the same period, tuna production by American flagship vessels rose to a new high of nearly a quarter of a million tons.

The good news is that the International Trade Commission is preparing to investigate the effects of foreign imports on the American tuna market. It conducted a similar study in 1984 and determined that "imports were not the cause of the demise of the U.S. tuna industry. The movement of fish to regions of the Western Pacific was to blame." The investigation will begin in September.

• Although the relocation of California's tuna cartel has crippled the industry, successful new marketing strategies are easing the pain, as fishermen and wholesalers probe new outlets for locally harvested tuna and albacore.

Most of California's local tuna is caught by purse seine, and although much of it is transshipped to foreign canners, some is going to American markets to meet an increasing demand for sushi. In Los Angeles, a half dozen wholesalers are buying tuna for sushi, and product movement is brisk. American Fish company in Los Angeles sells about a ton of tuna a week to sushi bars, according to spokesman Ken Yetter.

This market alternative to canning is gaining acceptance in restaurants throughout the western United States. Yetter cautions, however, that fishermen and processors must handle tuna for the sushi market more delicately than fish headed for the cannery, because sushi buyers, as well as their customers, are very discriminating. Prime sushi cuts sell for as much as $8 a pound retail.

• With local canners gone, the traditional Pacific Coast albacore fishery has gotten a facelift too. For the past two years, organizations such as the West Coast Fisheries Development Foundation (WCFDF) and the Western Fishboat Owners Association (WFOA) have experimented with alternate methods of processing and marketing the famous "chicken of the sea."

And the feds are kicking in money to help. In the past two years, more than $100,000 has been granted for educational campaigns focusing on the marketing of fresh and fresh-frozen albacore.

• In 1985, 8,052 tons of albacore were landed on the Pacific Coast. Nearly 14 percent, or 1,200 tons, was sold as fresh-frozen albacore to retail outlets and white-tablecloth restaurants. Some processors, such as Ocean Ventures Seafood in San Diego, are even exporting whole and loined albacore. Spokesman Kenny Alameda says he sold 690 tons of albacore overseas in 1985 and is making steady progress toward his eventual goal of 3,500 tons a year.

"Albacore is appearing on more restaurant menus all the time," says Bill Perkins of the WFOA. "The biggest battle is to make sure fishermen continue to improve the quality and handling of the product."

Like its yellowfin and bluefin cousins, albacore is quite fragile and has a shelf-life of only three or four days. Royal Pacific Seafood buyer Frank Fink says that, because fishermen are learning to handle the product properly, he was able to market eight times more albacore in 1985 than he did in 1984. — *Mick Kronman*

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